

PROCESS AUTOMATION MARKET (2013 – 2018)



By Type (PLC, SCADA, Valves, Transmitters, MES); By Industry (Chemical, Oil & Gas, Petrochemical, F&B, Paper, Automotive)

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KEY INSIGHTS

- ❖ Process automation will grow on key growth factors like mass customization, supply chain synchronization, integration of systems, functional costs and total system cost.
- ❖ As competition increases in the manufacturing industry and profit margins need to be protected, companies can opt for significant automation of the factories to reduce costs are move towards China, Taiwan for cheaper labour costs
- ❖ In the developed countries, the number of robots per 10,000 employees was 149 but it is only 11 in emerging markets, 6 in Latin America and 7 in EMEA emerging regions. This shows the huge scope and opportunity for the industrial automation market
- ❖ China accounts for more than 60% of Siemens control systems manufacturing currently
- ❖ The global process automation market revenue is expected to grow from \$87.67 billion in 2013, to \$119.29 billion in 2018, at an estimated CAGR of 6.4% from 2013 to 2018
- ❖ The process instrumentation market is expected to grow from \$23.67 billion in 2013, to \$31.71 billion in 2018, with a CAGR of 6%
- ❖ The APAC region is expected to accelerate the process automation market owing to the escalated demands from the oil and gas extraction, waste water treatment, and pharmaceutical segment
- ❖ Control systems have the largest market in factories with M2M interaction making the process completely automated.
- ❖ Innovative products and services are gradually capturing the Industrial Automation market

RESEARCH METHODOLOGY

The quantitative and qualitative data collected for the global Process Automation report is from a combination of secondary and primary sources. Research interviews were conducted with executives and/or managers in the key product manufacturers and related organizations. These Key Opinion Leaders (KOLs) were then provided a questionnaire to gather quantitative and qualitative inputs on their operations, performance, strategies and views on the overall market, including key developments and trends. Data from interviews is consolidated, checked for consistency and accuracy, and the final market numbers are again validated by experts. The global Process Automation was split by grades of polycarbonate resins, applications and geography based on different factors like primary and secondary sources, understanding of the number of companies operating in each segment and also KOL insights.

We have used various secondary sources such as directories, articles, white papers, newsletters, annual reports and paid databases such as OneSource, Hoovers and Factiva to identify and collect information for extensive commercial study of the global Process Automation.

The approach towards finding information regarding the market and forecasting has been quite extensive. The key players in the market and its value chain were identified through secondary research and their market opinions were also gathered in a similar way through telephonic interviews and questionnaires. Interviews with key opinion leaders such as managers and marketing personnel were used extensively in understanding the need and emergence of polycarbonate resin market.

We also have extensive database of contacts which were used to conduct primary interviews and also to get their inputs using questionnaires.

THE ARC ADVANTAGE

An analytical model lies at the core of our process, ensuring logical consistency throughout our research. We complement the model with secondary data and interviews with industry experts to reflect the latest trends. With our final expert validation, we provide you with only the most accurate and actionable intelligence.

THE ARC PROCESS

Analytical Method	Base Method	Consolidation Method	Delphi Verification
<ol style="list-style-type: none"> 1. Granular breakdown of drivers into factors 2. Validate all factors in terms of their present impact on the market 3. Assign weights to these factors in terms of their relevance and impact on the market 4. Build the Analytical Model 	<ol style="list-style-type: none"> 1. Get a top-down estimate of the market 2. Follow it up with a bottom-up estimate of the market 3. Check for consistency and new growth factors that are relevant over the next 10 Years 4. Build the Base model 	<ol style="list-style-type: none"> 1. Granular breakdown of drivers into factors 2. Validate all factors in terms of their present impact on the market. 3. Assign weights to these factors in terms of their relevance and impact on the market. 4. Build the Consolidated Model 	<ol style="list-style-type: none"> 1. Verify the findings of the model with experts from across the value chain 2. Verify the findings with players across small and large enterprises 3. Tweak the model and add new factors 4. Finalize the ARC Model

ANALYTICAL MODEL → BASE MODEL → CONSOLIDATED MODEL → ARC MODEL

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